

VPMi
PROFESSIONAL
Users Guide

VPMi 4.1 User's Guide

Enter and Manage a Service Request

Service requests are a useful way to submit new project ideas or change requests for existing projects to management. A user enters a request into the VPMi, and then an approver decides whether to accept or reject the request. If the request is accepted, the approver then has to decide how to transform it into work. One or more requests can be converted into a new project or added to an existing project where they can be turned into a project item, such as an issue or change request.

Enter a Service Request

Entry of Service Requests is a two step process: 1) Enter Request; 2) Provide Business Value information, if known. To enter a service request into the VPMi, click on the Create Service Request link on the home page in the My Items section. You are directed to the following screen:

The screenshot shows the 'Add Service Request' form in the VPMi Professional interface. The form is divided into several sections for data entry:

- Description:** Includes 'Service Request Title', 'Service Request Description', and 'Category'.
- Corporate Strategy:** A dropdown menu currently showing 'Avoid Cost'.
- Priority:** A dropdown menu.
- Initiated By:** A dropdown menu showing 'Smith,John - 2'.
- Requesting Organization:** A dropdown menu showing '+Corporate Headquarters'.
- Project Manager:** A dropdown menu.
- In Scope:** A text area.
- Out of Scope:** A text area.
- Business Deliverables:** A text area.
- Business Justification/Benefits:** A text area.
- Assumptions:** A text area.

Navigation buttons at the top of the form include 'Add', 'Cancel / Back', and 'Clear'. A left-hand navigation menu lists various system functions and item counts.

Here you may enter description, status and date, information. Required information includes service request title, description, corporate strategy, initiated by, status (Draft is default status) and desired by date required. Once you have entered this information, click *Add*. Note that all text fields are rolling text fields. This means that each time you update the text in these fields it appends the updates to earlier entries with a date/time/person stamp. You are now directed to the Business Value screen.

Assessment Criteria	Assessment Scale	Justification
Internal Impact	No Impact	
External Impact	No Impact	
Financial Impact	No Impact	
Service Impact	No Impact	

[Add](#)

Here you may select choices from the drop-down menus to help determine the business value of the request. You may also enter a justification for any of your responses. Click *Add* when you are finished.

After entering the Business Value, you will be directed to the details screen (Detail View) of the service request. The request has now been entered and resides in the Draft Requests process step. At the top of the screen you will see the following options:



Each link will allow you to update different elements of the service request record, view reports or navigate to different views of service requests. Specifically, these links will do the following:

1. **Draft Request Grid Listing:** This link will take you out of the detail view for this particular service request and return a list of all services requests currently in the Draft step of the project lifecycle.
2. **Update:** This link will take you back into the first screen you completed when adding the service request. It will allow you to update all of the fields on the service request add screen. It is also where you will find the option to route the service request to the next step in the project lifecycle. This is discussed in greater detail below.
3. **Delete:** This will allow you to delete the service request you just entered into VPMi.
4. **Add Attachment(s):** This link will allow you to attach documents and view existing documents for the service request.
5. **Add New Service Request:** From this page you can immediately add another service request in VPMi with this link. It will not be related to this service request. This is a link only available to aid in navigation.
6. **Balanced Scorecard:** This will return you to the second step of adding a new service request where you completed the business value assessments. Here you can change the assessment values you set when adding the service request.
7. **Service Request Estimate:** This link returns a page where rough order of magnitude (ROM) estimates can be made for the cost of this service request should it become a new project or part of an existing project. Details on this feature are described below.
8. **Service Request Details Report:** This returns a pre-formatted report that will show all service request details. The report can be exported out of VPMi into Microsoft Word.

Service Request Estimate

Part of the process of defining a service request is estimating the cost of the service request. Selecting this link will return the following view:

The screenshot displays the VPMi Professional web application interface. At the top left is the VPMi logo. The top navigation bar includes icons for Home, Projects, Programs, Standards, Organizations, Locations, Reports, Maintenance, Log off, and Help. A left-hand navigation menu lists various user actions and reports. The main content area is a form for creating a service request, with fields for Description, Organization, Estimate Version, Labor (Internal and External Hours and Comments), Hardware/Software Dollars and Comments, Other Non-Labor Expense and Comments, and Audit (Initiated By and Modified By). Buttons for Add, Cancel / Back, and Clear are present at the top and bottom of the form.

My Items

- My Home
- Create Project
- Create Service Request
- My Time & Status**
- Enter Time
- Approve Time
- Status Reports (159) [Add](#)
- My Assignments**
- Requested Projects (245)
- Assigned Projects (151)
- Workplan Items (550)
- Issues (34) [Add](#)
- Risks (7) [Add](#)
- Change Requests (16) [Add](#)
- Support (51) [Add](#)
- Action Items (17) [Add](#)
- My Settings**
- Review Personal Settings
- Skills (3)
- User Administration
- Account Info

Add **Cancel / Back** **Clear**

Description

Service Request **Organization** **Estimate Version**

Integrate .NET Reports into Legacy Application (Long Title) Eng-Packaging - 368 Version 1
 (Long Title) Eng-Packaging - 368
 FN-Accounts Payable - 377
 IT-Operations - 371

Labor

Internal Labor Hours **Internal Labor Comments**

External Labor Hours **External Labor Comments**

Hardware/Software

Hardware/Software Dollars **Hardware/Software Comments**

Other

Other Non-Labor Expense **Other Non-Labor Expense Comments**

Audit

Initiated By **Modified By**

Smith,John - 2 Smith,John - 2

Add **Cancel / Back** **Clear**

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This section allows different organizations setup in VPMi to provide estimates of the time and non-labor costs associated with completing this service request. In order for an organization to be able to provide estimates, they need to be setup in maintenance as an estimating organization. To do this, go to the Maintenance section of VPMi, select the Enterprise tab and click on Organizations. Update a particular organization and you will see the following:

Description

ID 371	Organization Title IT-Operations	Description Information Technology - Operations
Organization Manager Bliss,Bill - 1281	Resource Manager Skelly,Robert - 1282	Parent Organization +Engineering +Finance +Human Resources +Information Technology +Marketing
Level Department	Location US - Chicago	Rate 90

Status

Active Yes	Responsible Yes	Requesting Yes
Estimating Org Yes	Comments	

On the organization add/update view there are two fields important for allowing that organization to provide cost estimates on service requests. The first is a field called 'Estimating Org'. This needs to be set to 'Yes'. There is also a field called 'Rate'. This rate is used to calculate labor costs. On the service request estimate form, one of the fields is labor hours. In order to estimate the labor cost, the hours need to be multiplied by some value. In this case, the estimates are high level, so they are multiplied by the blended hourly rate assigned to the organization. If this field is left blank, the labor costs on the service request estimate will always be zero.

After adding one or more service request estimates, you will see a grid view of all estimates with a total. It will look like the following:

[Return to Service Request](#)
[Add Service Request Estimate](#)
[Filter](#)
[Download To Excel](#)

Organization	Estimate Version	Internal Labor Hours	External Labor Hours	Hardware/Software Dollars	Other Non-Labor Expense
IT-Operations-371	Version 1	200	No Entry	\$3,500.00	\$2,500.00
FN-Accounts Payable-377	Version 1	40	No Entry	No Entry	No Entry
Add Complete		1	(2 Records)	2	
Service Request Estimate Totals					
Estimate Version	Total Labor Hours	Total Labor Dollars	Total Expense	Total Dollars	
Version 1	240	\$20,000.00	\$6,000.00	\$26,000.00	

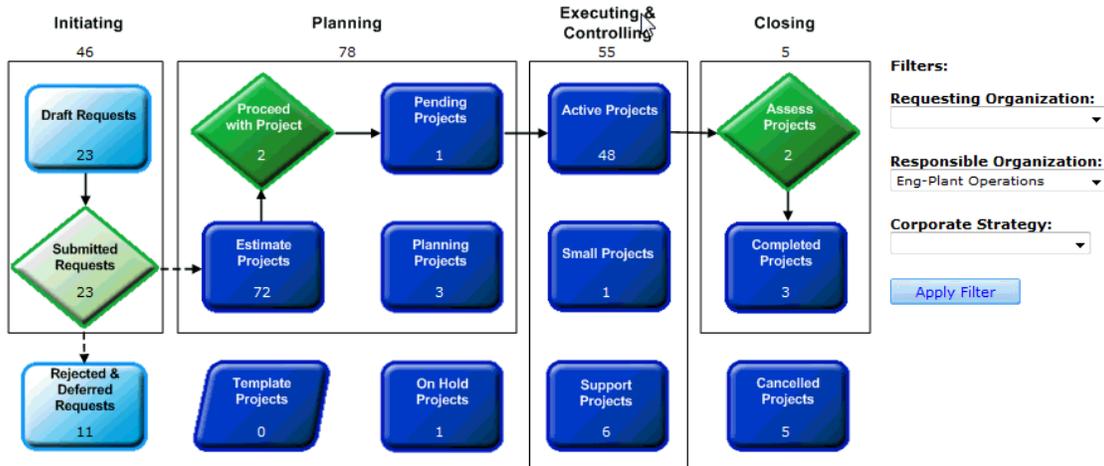
In this example, you can see that two different organizations provided estimates. Both are the first version of the estimates. Subsequent estimates can be provided with a newer version. This allows for maintaining the original estimate and comparing it to revised estimates.

Route a Service Request

Service requests are part of the project lifecycle. The project lifecycle process map can be accessed from the Projects drop-down menu by selecting the first option, Project Flowchart. The process map is described in further detail in the Project section of this guide.

Typically, when service requests are entered they reside in the Draft Requests process step. When the request is ready to be submitted to management, it is then routed to the Submit Requests process step. From there, the approver can add the request to a new project, add it to an existing project, reject or defer it and even prioritize it.

Following is the project lifecycle process map. Process steps pertaining to service requests are represented as light blue boxes on the left side of the process map:



Route Service Request to Submit Requests step:

- You can either look for your service requests (those service requests you either initiated or are assigned to) by clicking on the quantity link for Draft Requests on the process map and searching or you can access only your service requests from the menu bar in the top frame of VPMi. Hover over the 'Home' icon and a list will drop-down. Select 'My Service Requests'. Either way will take you to a grid listing of either all service requests in the Draft Requests step or only those service requests you can edit (which may be distributed among all steps in the service request portion of the process map).
- Click on the  Update icon on the far right. (You will see the Update icon only if you have authority to update the request.) This will take you to an Update screen similar to when you entered the request. The Status field is the first field in the Status section of the form. Select "Submitted" from the drop-down menu. Once you click *Update*, the service request will be routed to the Submit Requests step.

Prioritize Service Requests:

When a service request is moved to the submitted step of the process map, it can be prioritized. Oftentimes, service requests are coming to an organization from either another business unit in the company or an external client. It is common for a particular organization or client to have more than one request. In an effort to help the organization that will ultimately be responsible for the work to understand the priorities, the requesting organization can use the prioritization functionality in the VPMi to communicate the priority of their requests. This can be extremely helpful when limited resources will not allow for an organization to absorb and work on all requests simultaneously.

In order to set the priority for service requests, the responsible organization must first be selected on the service request. This is a non-required field that can be populated when the service request is first added or later when updated. Once populated, the organization requesting the work can navigate to the Organizations section of the VPMi and drill down to their organization level on the dashboard. This is done by selecting the correct Organization on the left side of the dashboard. For reference purposes, the dashboard will look like the following:



When viewing the dashboard, the organization selected to the left of the dashboard will update what is displayed on the right. In the case above, the Engineering organization has been selected. Note that on this dashboard in the top right is the option to view 'Requested' or 'Responsible'. This allows the user to see all projects that have been requested by the organization selected or all projects where the organization selected is responsible for completing the work. For the purposes of service requests, the requesting view is the one to use.

The first two reports on the dashboard are a pie chart and a bar chart. Underneath the Projects by Strategy bar chart is the link to prioritize service requests. This link is called 'Run Service Request Priority Report'. Selecting this link will return all service requests that the selected organization has requested. Clicking on the link will return the following view:



Here the requests can be prioritized and updated. The latest service request added is moved to the bottom of the list. To move service requests around, select a particular service request and use the arrow buttons on the right to move the request up and down on the priority list. When finished, click the Submit button to save the changes. You can then navigate out of this page.

Prioritization of service requests can happen at multiple levels of the organization structure. For example, if the Engineering Plant Operations department submitted a service request, they could prioritize that request along with any other requests they have submitted. However, in the organization hierarchy, Engineering Plant Operations falls under the Engineering organization. Likewise, Engineering falls under the overall company. Because of this, Engineering can also set priorities for service requests that are submitted by any department or team under the Engineering organization. At the company level, all service requests can be prioritized, regardless of the organization to which they belong. This explains why the service request grid view for submitted service requests will sometimes show more than one priority. For example, see below:

Filter Download To Excel

Select	ID	Title	Status	Organization	Priority	Corporate Strategy	BVA	Origination Date	Desired By Date	Mandated Date	
<input type="checkbox"/>	2516	Kanban	Submitted	Corporate Headquarters - 2 Engineering - 2	2 - Significant Impact	Avoid Cost	2.50	5/10/2007	2/27/2008	9/26/2008	
<input type="checkbox"/>	2513	Using lean as a competitive weapon	Submitted	Corporate Headquarters - 4 Engineering - 1	3 - Some Impact		2.25	5/10/2007		5/2/2008	
<input type="checkbox"/>	2522	Which elements of the law are of crucial importance in operations	Submitted	Corporate Headquarters - 6	2 - Significant Impact		2	5/10/2007		11/1/2007	
<input type="checkbox"/>	2512	Wiki engineering virtual team	Submitted	Corporate Headquarters - 7 Engineering - 3	3 - Some Impact		2	5/10/2007		6/29/2007	
<input type="checkbox"/>	2528	Open environments	Submitted	Corporate Headquarters - 3	3 - Some Impact		1.25	5/11/2007		2/4/2008	
<input type="checkbox"/>	4667	Better information management	Submitted	Corporate Headquarters - 1			2	11/27/2007		12/28/2007	
<input type="checkbox"/>	6115	Integrate .NET Reports into Legacy Application	Submitted	Engineering - 4		Improve Svc	0	10/9/2008	11/28/2008		
<input type="checkbox"/>	5125	Threaded Discussion Test	Submitted			Avoid Cost	0			4/30/2008	

1 (8 Records) 8

Convert Service Request into Project Work or Defer or Reject Request

First navigate to the grid listing in the Submit Requests process step by clicking on the quantity link. You will bring up the following screen:

Filter Download To Excel

Select	ID	Title	Status	Organization	Priority	Corporate Strategy	BVA	Origination Date	Desired By Date	Mandated Date	
<input type="checkbox"/>	2516	Kanban	Submitted	Corporate Headquarters - 2 Engineering - 2	2 - Significant Impact	Avoid Cost	2.50	5/10/2007	2/27/2008	9/26/2008	
<input type="checkbox"/>	2513	Using lean as a competitive weapon	Submitted	Corporate Headquarters - 4 Engineering - 1	3 - Some Impact		2.25	5/10/2007		5/2/2008	
<input type="checkbox"/>	2522	Which elements of the law are of crucial importance in operations	Submitted	Corporate Headquarters - 6	2 - Significant Impact		2	5/10/2007		11/1/2007	
<input type="checkbox"/>	2512	Wiki engineering virtual team	Submitted	Corporate Headquarters - 7 Engineering - 3	3 - Some Impact		2	5/10/2007		6/29/2007	
<input type="checkbox"/>	2528	Open environments	Submitted	Corporate Headquarters - 3	3 - Some Impact		1.25	5/11/2007		2/4/2008	
<input type="checkbox"/>	4667	Better information management	Submitted	Corporate Headquarters - 1			2	11/27/2007		12/28/2007	
<input type="checkbox"/>	6115	Integrate .NET Reports into Legacy Application	Submitted	Engineering - 4		Improve Svc	0	10/9/2008	11/28/2008		
<input type="checkbox"/>	5125	Threaded Discussion Test	Submitted			Avoid Cost	0			4/30/2008	

1 (8 Records) 8

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Check the selection boxes to the right of those service requests that are ready to be turned into project work. After you have selected all desired requests, click *Select* at top of column. The screen will be returned with additional text and functionality at bottom of screen:

VPM PROFESSIONAL

Home Projects Programs Standards Organizations Locations Reports Maintenance Log off Help

Submitted Service Requests

My Items

My Home

Create Project

Create Service Request

My Time & Status

Enter Time

Approve Time

Status Reports (159) [Add](#)

My Assignments

Requested Projects (245)

Assigned Projects (151)

Workplan Items (550)

Issues (34) [Add](#)

Risks (7) [Add](#)

Change Requests (16) [Add](#)

Support (51) [Add](#)

Action Items (17) [Add](#)

My Settings

Review Personal Settings

Skills (3)

User Administration

Account Info

Filter Download To Excel

Select	ID	Title	Status	Organization	Priority	Corporate Strategy	BVA	Origination Date	Desired By Date	Mandated Date	
<input type="checkbox"/>	2516	Kanban	Submitted	Corporate Headquarters - Engineering - 2	2 - Significant Impact	Avoid Cost	2.50	5/10/2007	2/27/2008	9/26/2008	
<input type="checkbox"/>	2513	Using lean as a competitive weapon	Submitted	Corporate Headquarters - Engineering - 1	3 - Some Impact		2.25	5/10/2007		5/2/2008	
<input type="checkbox"/>	2522	Which elements of the law are of crucial importance in operations	Submitted	Corporate Headquarters - Engineering - 3	2 - Significant Impact		2	5/10/2007		11/1/2007	
<input type="checkbox"/>	2512	Wiki engineering virtual team	Submitted	Corporate Headquarters - Engineering - 3	3 - Some Impact		2	5/10/2007		6/29/2007	
<input type="checkbox"/>	2528	Open environments	Submitted	Corporate Headquarters - Engineering - 3	3 - Some Impact		1.25	5/11/2007		2/4/2008	
<input type="checkbox"/>	4667	Better information management	Submitted	Corporate Headquarters - Engineering - 1	3 - Some Impact		2	11/27/2007		12/28/2007	
<input checked="" type="checkbox"/>	6115	Integrate .NET Reports into Legacy Application	Submitted	Engineering - 4		Improve Svc	0	10/9/2008	11/28/2008		
<input type="checkbox"/>	5125	Threaded Discussion Test	Submitted			Avoid Cost	0		4/30/2008		

1 (8 Records) 8

So far, you have selected the following Service Request(s) for Routing:
Integrate .NET Reports into Legacy Application

Please Select an Action

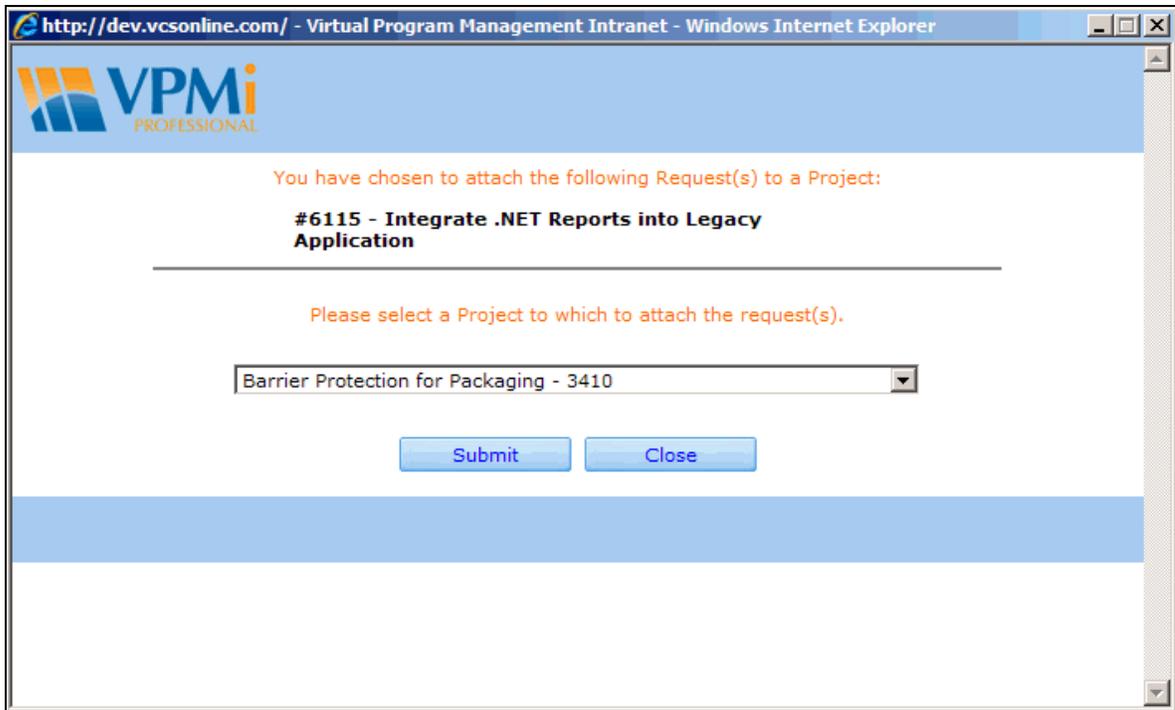
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The drop down box that appears at the bottom of the grid offers four options:

1. Add to an Existing Project
2. Add to a New Project
3. Deferred Requests
4. Rejected Requests

Add Service Request to Existing Project

If you click *Add to an Existing Project*, this popup will appear:



- From the drop-down menu, select which project to which you would like to attach the request(s) and click *Submit*. You will be returned to the Grid listing of service requests.
- To verify that the service request was attached to the project, locate the project to which you added the service request, and view the details (Detail View) of the project.
- View the service request you added by clicking on *Requests* in the left hand Project Toolbox on the Project Details screen. You can also view service requests attached to a project from a project grid view. Use the quick links icon on the right side of the grid view. Hover over the icon and it will show all tools available for that project. In the list of tools is *Service Requests*. Click on that tool to go directly to the service requests on the project.
- Another option for viewing service requests that have been converted to new projects or attached to existing projects is from the My Service Request menu. If you use the menu bar in the top header of the VPMi application and hover over the Home icon, a drop-down list appears and you can select 'My Service Requests'. Those that have been associated to a new project or converted into a new project will appear on the list with a project name next to them and the status of 'Assigned'.

Add Service Request to a New Project

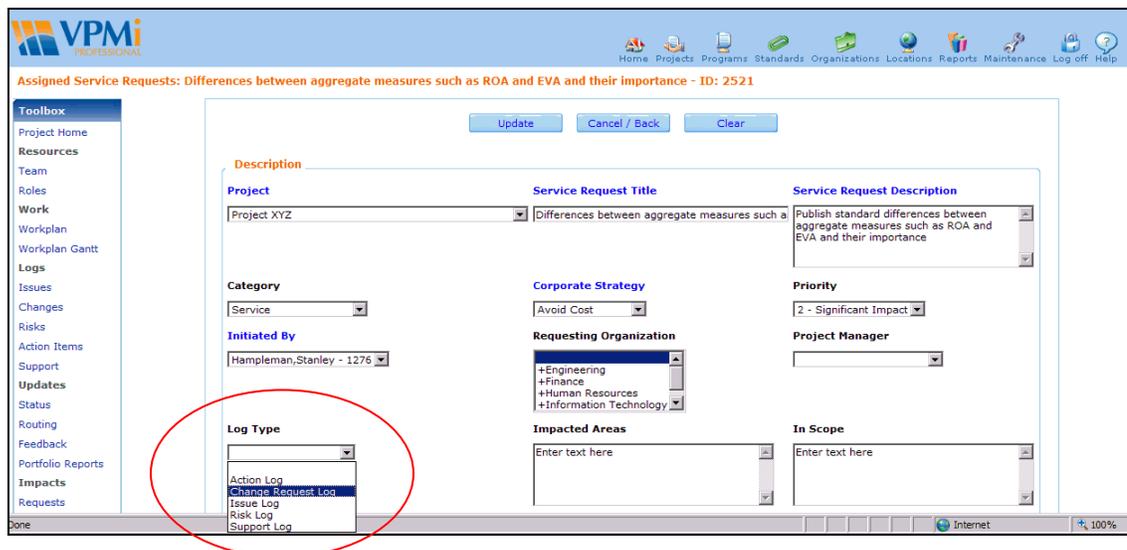
If you click *Add to a New Project*, you will be directed to the Add Project screen (entering a project is explained in detail in the Project section of this guide).

- Some project information will be pre-populated with information obtained from the service request, including project title, requestor and required date.
- Provide additional project information, including business value and initial routing, and then click *Add*.
- The detail view of the new project will be displayed.
- The original service request is saved as a part of the project record and can be viewed by clicking on *Requests* in the project toolbox.

Transform a Service Request into a Project Item

After a service request is attached to a project, it may be transformed by the project manager into a project log item such as an action, change, issue, risk, or support item.

- Go to the details view of the project to which the service request has been added.
- Select *Requests* in the Project Toolbox to bring up a Grid listing of all service requests attached to the project.
- Click on the  Update icon on the right of a service request row to enter Update View for the service request.
- You will see a new field at the end of the Description section called Log Type. Select the appropriate log item from the drop-down menu. Once you click *Update*, the service request will be turned into the log item you specified. Please note, it will no longer be listed as a service request. If you change the service request into a change request, you will now need to look at the change request log to see the service request. From there, it can be managed as a change request.



The screenshot displays the VPMi Professional software interface. The top navigation bar includes icons for Home, Projects, Programs, Standards, Organizations, Locations, Reports, Maintenance, Log off, and Help. The main content area is titled "Assigned Service Requests: Differences between aggregate measures such as ROA and EVA and their importance - ID: 2521". The interface is divided into several sections:

- Description:** Contains fields for Project (Project XYZ), Service Request Title (Differences between aggregate measures such as ROA and EVA and their importance), and Service Request Description (Publish standard differences between aggregate measures such as ROA and EVA and their importance).
- Category:** Set to Service.
- Corporate Strategy:** Set to Avoid Cost.
- Priority:** Set to 2 - Significant Impact.
- Initiated By:** Hampleman, Stanley - 1276.
- Requesting Organization:** A list of organizations including Engineering, Finance, Human Resources, and Information Technology.
- Project Manager:** A dropdown menu.
- Log Type:** A dropdown menu highlighted with a red circle, showing options: Action Log, Change Request Log, Issue Log, Risk Log, and Support Log.
- Impacted Areas:** A text input field with the placeholder "Enter text here".
- In Scope:** A text input field with the placeholder "Enter text here".

Buttons for Update, Cancel / Back, and Clear are located at the top of the form.